



SOUTH AFRICA MEDIA LANDSCAPE

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Country Overview

AFRICA'S THIRD LARGEST ECONOMY



CAPITAL

**Pretoria
(executive); Cape
Town (legislative);
Bloemfontein
(judicial)**

REGION

Africa

GDP PER CAPITA, PPP

\$13,630

GDP

\$368.3 billion

POPULATION

57,779,622

AREA

1,219,090 SQ.KM

South Africa is located on the southern tip of Africa, with coastlines on both the Atlantic and Indian oceans.

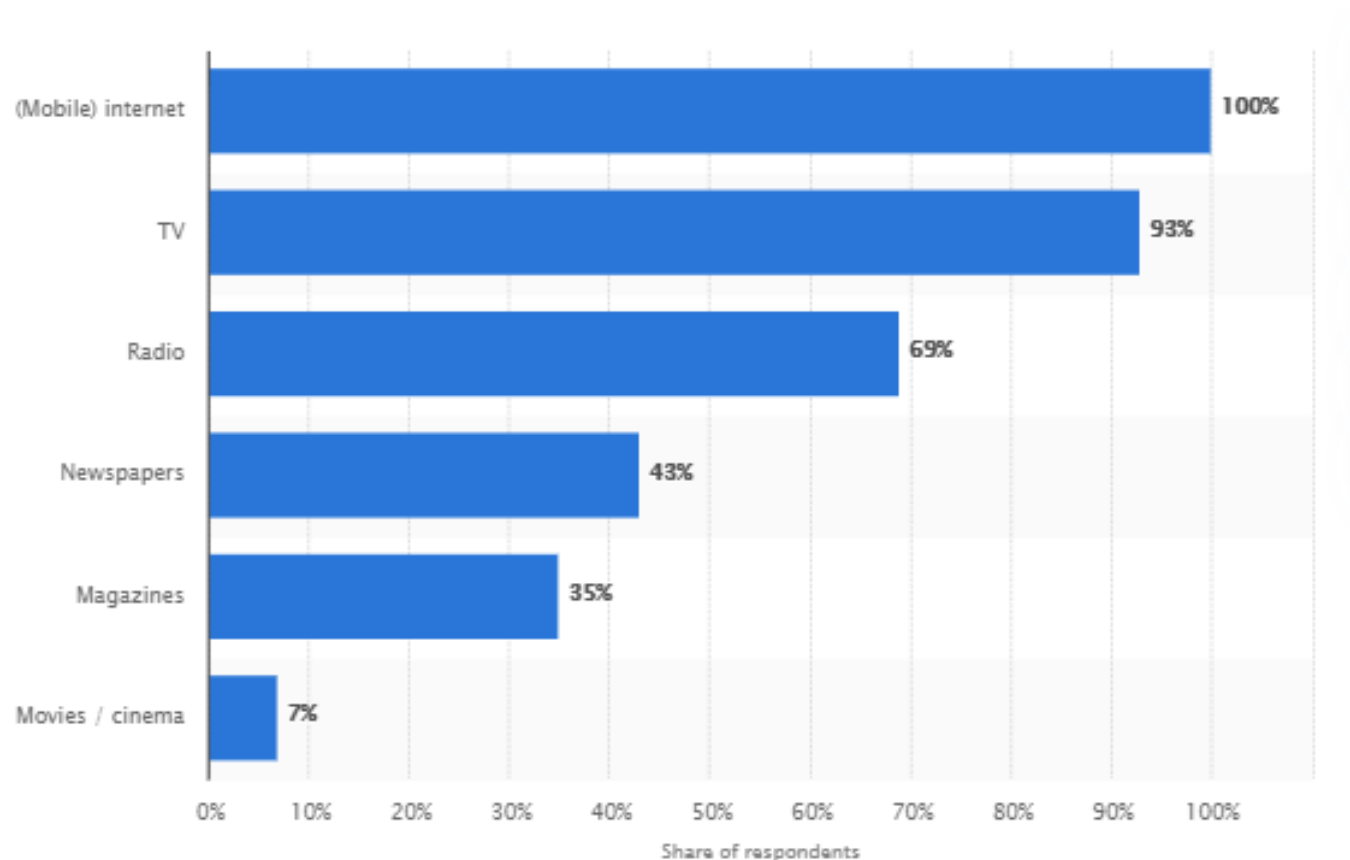
Africa's third-largest economy behind Nigeria and Egypt, South Africa draws hundreds of thousands of visitors each year eager to see its impressive terrain, wildlife and cultural diversity.

The country's main industries include manufacturing as well as finance, real estate and business services, and produces almost half the entire continent's electricity output.

Media Consumption Overview

TV AND RADIO PERFORM ARE THE STONGEST TRADITIONAL MEDIA

Daily media consumed (2020)



TV has the highest reach



Radio holds a strong hold



Print has declines over the years but still reaches millions

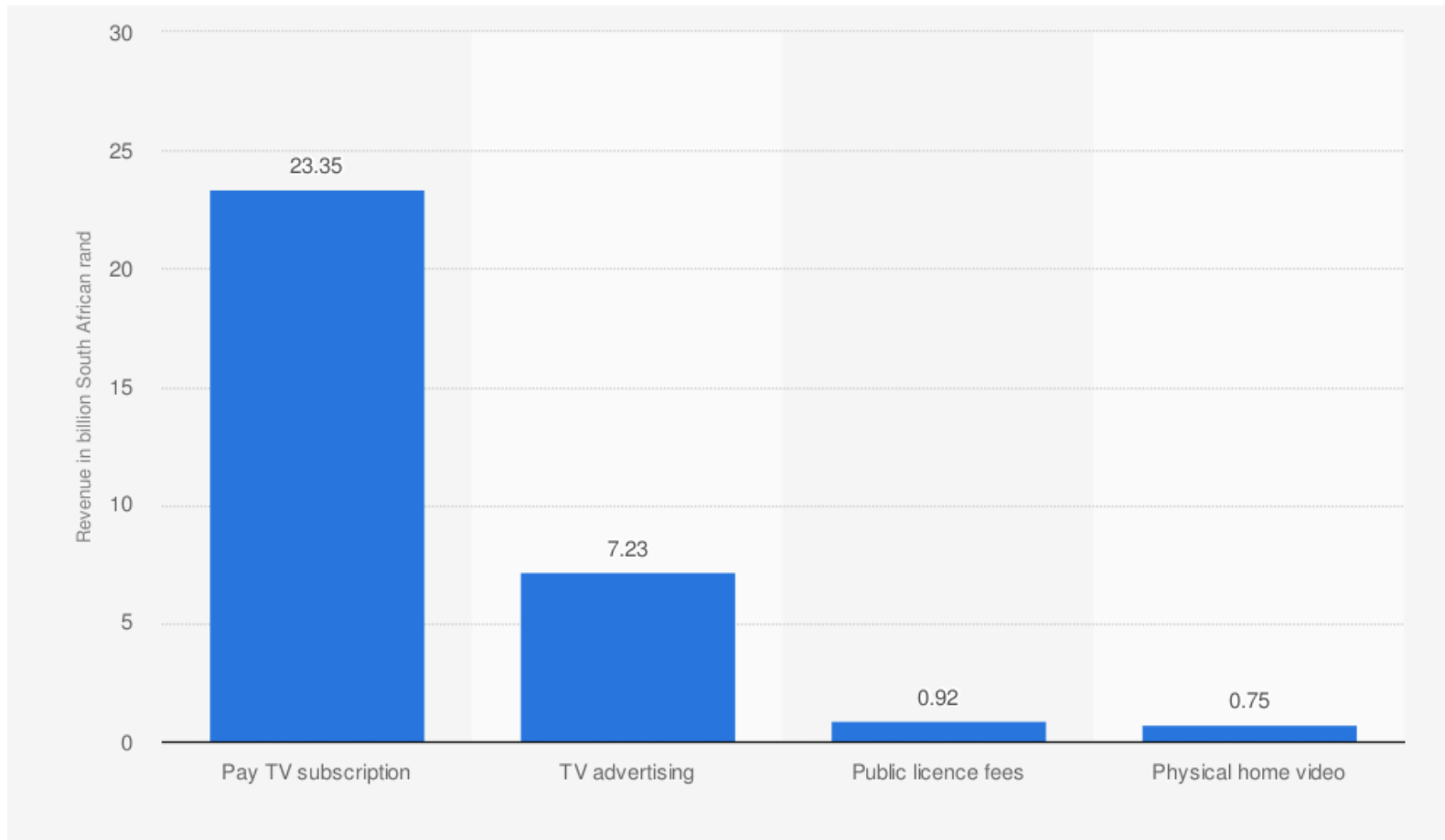


Digital consumption is witnessing a rapid increase

TV Consumption

PAY TV SUBSCRIPTIONS GENERATED 23.35 BILLION RAND IN REVENUE IN SOUTH AFRICA

TV market revenue in South Africa, by segment



- TV ratings in South African have gone through the roof as time spent viewing during lock down almost doubled in 2020
- Consumers increasingly see video-on-demand subscriptions as interchangeable, pushing the streaming wars to a new level. Content aggregators will take centre stage to unlock new customer acquisition strategies in 2021

TV Consumption

TOP TV CHANNELS



SABC 1

SABC 1 is the most watched television channel in South Africa. The channel broadcasts in a wide range of languages, carrying news, entertainment and sports.



DStv

DStv is Multichoice's main digital satellite service. Launched in 1995, it now has 150 channels. The subscription-based service is available in South Africa and throughout Africa. Content ranges from South African-produced programmes, to international syndicated content, sports and news.



SABC 2

SABC 2, carries programming in a range of languages, including most of the SABC's Afrikaans programming. The channel has a high proportion of locally produced programming. It is a family entertainment channel.



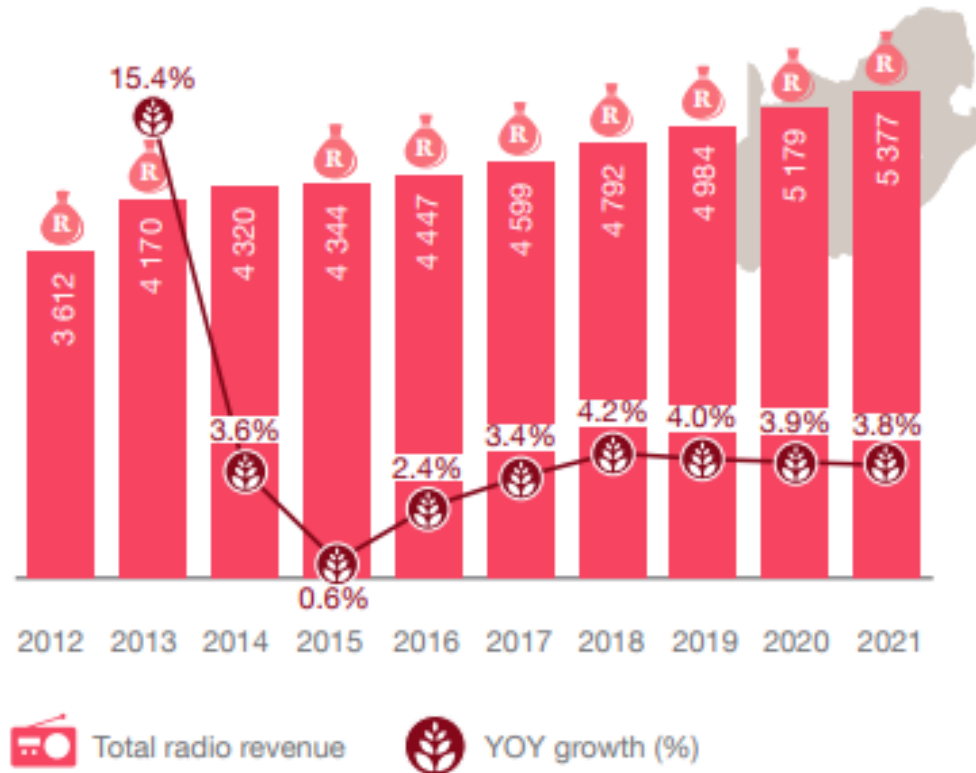
e.tv

Launched in 1998, e.tv is South Africa's only free-to-air television channel. The station carries a mix of news, sports and entertainment. e.tv broadcasts mainly in English, although does carry some programming in other languages in order to comply with its license requirements.

Radio Consumption

RADIO REACHES ALMOST 70% OF THE POPULATION

Figure 1 South Africa: Radio revenue (R millions) and year-on-year growth (%), 2012–2021



- Radio revenue will increase at a 3.9% CAGR over the next five years, with revenue rising to R5.4 billion in 2021
- Listenership has faced a period of uncertainty after the implementation of a 90% local content policy on radio stations by the SABC in 2016

Radio Consumption

UKHOZI FM ALONE BOASTS OVER SEVEN MILLION WEEKLY LISTENERS

| Ranking | Station | Weekly listenership |
|---------|--------------------------|---------------------|
| 1 | Ukhozi FM | 7 670 000 |
| 2 | Umhlobo Wenene FM (UWFM) | 5 409 000 |
| 3 | Metro FM | 4 372 000 |
| 4 | Lesedi FM | 3 196 000 |
| 5 | Thobela FM | 2 978 000 |

Radio Consumption

TOP RADIO STATIONS



Ukhozi FM

Frequency: 90.8 FM

Ukhozi FM is a South African national radio station & owned by SABC, based in Durban, KwaZulu-Natal that caters to the needs of the Zulu-speaking community.



UMhlobo Wenene FM (UWFM)

Frequency: 88.0 FM

UMhlobo Wenene FM (UWFM) is a South African radio station, providing news, sports, and entertainment broadcasts in isiXhosa.



Metro FM

Frequency: 91.7 FM

Metro FM is a national radio station in South Africa owned by the South African Broadcasting Corporation. It broadcasts urban contemporary music throughout the country 24/7 on FM Stereo.



Lesedi FM

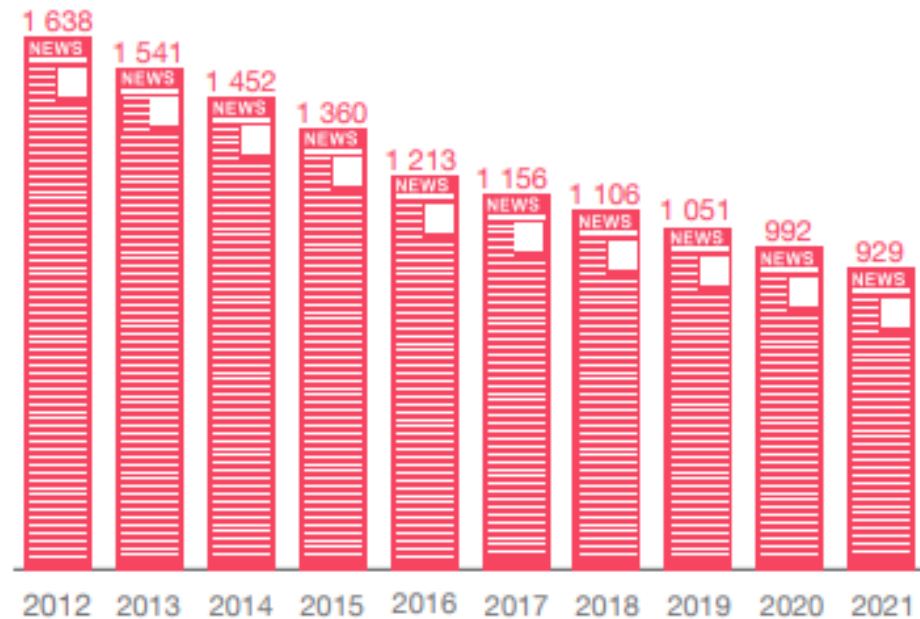
Frequency: 97.7 FM

Lesedi FM is a South African radio network owned by the South African Broadcasting Corporation (SABC). It is an Adult Contemporary radio station broadcasting in the Sesotho language.

Print Consumption

PRINT IS READ BY ALMOST 43% OF THE POPULATION

Figure 2 *South Africa: Average daily print circulation, 2012–2021 (Thousand copies)*



- In 2017, there were 22 daily and 25 weekly major urban newspapers in South Africa, most published in English
- The larger titles, which make up the bulk of the industry, have now begun to see audience migration to digital platforms. Whereas, small and grassroots publications like regional languages and newly affluent local consumers, may find they boast a customer connection that larger providers have now lost
- In 2021, the newspaper market in South Africa is expected to be R1.5 billion

Print Consumption

TOP PRINT TITLES



Sunday Times **Circulation: 206,182**

The Sunday Times is South Africa's biggest Sunday newspaper. It publishes news, investigative exposé, sport, opinion, entertainment and more.



Financial Mail **Circulation: 18,386**

Financial Mail is a weekly South African business publication focused on reaching the country's leading businesspeople. The FM also publishes a series of popular corporate profiles as well as annual publications.



Business Day **Circulation: 19,050**

Business Day is a national daily newspaper in South Africa, published weekdays. It covers all major national and international news, with a specific focus on the South African economy and business sector, companies and financial markets. It also contains an influential opinion section with several popular columnists, along with coverage of sport, travel, books, arts and entertainment.

Print Consumption

TOP PRINT TITLES



Daily Sun Circulation: 95,021

The Daily Sun is a tabloid daily newspaper in South Africa. It targets readers in and around the major urban centers. These readers are predominantly black, English-literate with high-school or further education, and working-class earners.



Rapport Circulation: 90,393

Rapport is an Afrikaans-language weekly newspaper (released on Sundays) in South Africa and published by Media24. It is the second largest Sunday newspaper in South Africa after the Sunday Times. Rapport offers exclusive news on politics, sport and people.

Digital Consumption

THE NUMBER OF INTERNET USERS IN SOUTH AFRICA 4.5% BETWEEN 2020 AND 2021



Digital Consumption

SOUTH AFRICANS SPEND THE MOST TIME ON YOUTUBE

JAN
2021

TOP WEBSITES BY TRAFFIC (SIMILARWEB)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO SIMILARWEB

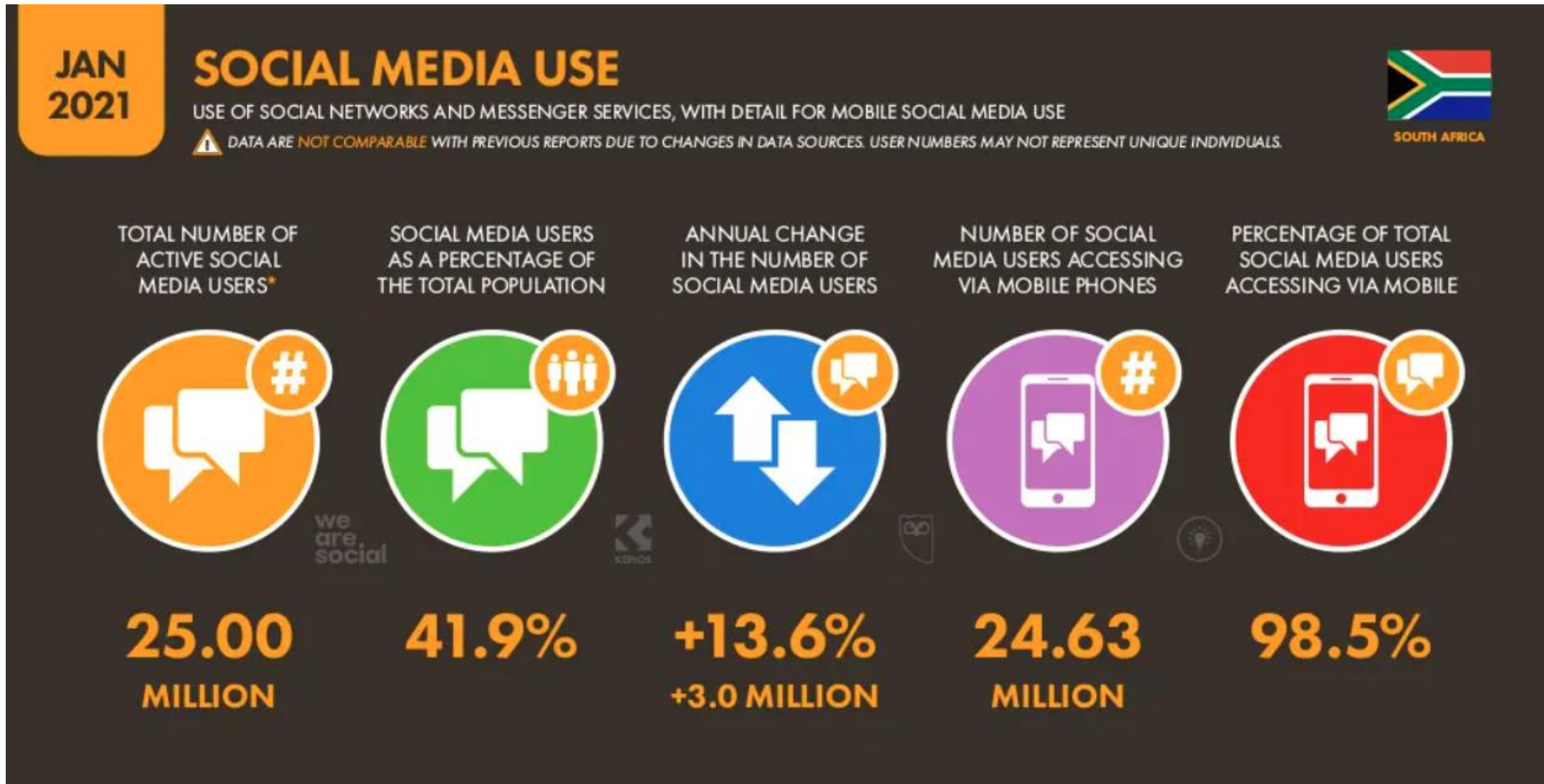


| # | WEBSITE | TOTAL VISITS | UNIQUE VISITS | TIME PER VISIT | PAGES PER VISIT |
|----|-------------------|--------------|---------------|----------------|-----------------|
| 01 | GOOGLE.COM | 571M | 26.4M | 9M 54S | 6.8 |
| 02 | YOUTUBE.COM | 198M | 14.6M | 23M 17S | 10.4 |
| 03 | FACEBOOK.COM | 191M | 21.1M | 11M 20S | 8.2 |
| 04 | NETFLIX.COM | 40.5M | 2.76M | 12M 08S | 4.2 |
| 05 | INSTAGRAM.COM | 33.3M | 6.21M | 6M 53S | 8.8 |
| 06 | XVIDEOS.COM | 32.6M | 4.62M | 11M 09S | 10.5 |
| 07 | HOLLYWOODBETS.NET | 32.3M | 1.79M | 12M 23S | 19.9 |
| 08 | TWITTER.COM | 31.8M | 6.58M | 10M 19S | 10.2 |
| 09 | DSTV.COM | 30.4M | 1.72M | 10M 49S | 5.9 |
| 10 | GOOGLE.CO.ZA | 22.1M | 2.31M | 6M 53S | 9.2 |

| # | WEBSITE | TOTAL VISITS | UNIQUE VISITS | TIME PER VISIT | PAGES PER VISIT |
|----|---------------|--------------|---------------|----------------|-----------------|
| 11 | WHATSAPP.COM | 17.4M | 3.56M | 2M 27S | 1.4 |
| 12 | NEWS24.COM | 16.7M | 3.27M | 3M 07S | 2.3 |
| 13 | WIKIPEDIA.ORG | 16.3M | 5.32M | 3M 28S | 2.6 |
| 14 | XNXX.COM | 14.2M | 2.50M | 8M 22S | 11.4 |
| 15 | BETWAY.CO.ZA | 13.4M | 2.74M | 11M 33S | 5.2 |
| 16 | PORNHUB.COM | 12.7M | 2.43M | 8M 46S | 6.4 |
| 17 | TAKEALOT.COM | 11.6M | 3.05M | 8M 21S | 9.7 |
| 18 | YAHOO.COM | 11.5M | 1.94M | 7M 53S | 5.3 |
| 19 | ESHKOL.IO | 10.9M | 4.16M | 1M 24S | 1.4 |
| 20 | OFFICE.COM | 10.6M | 1.21M | 9M 43S | 6.6 |

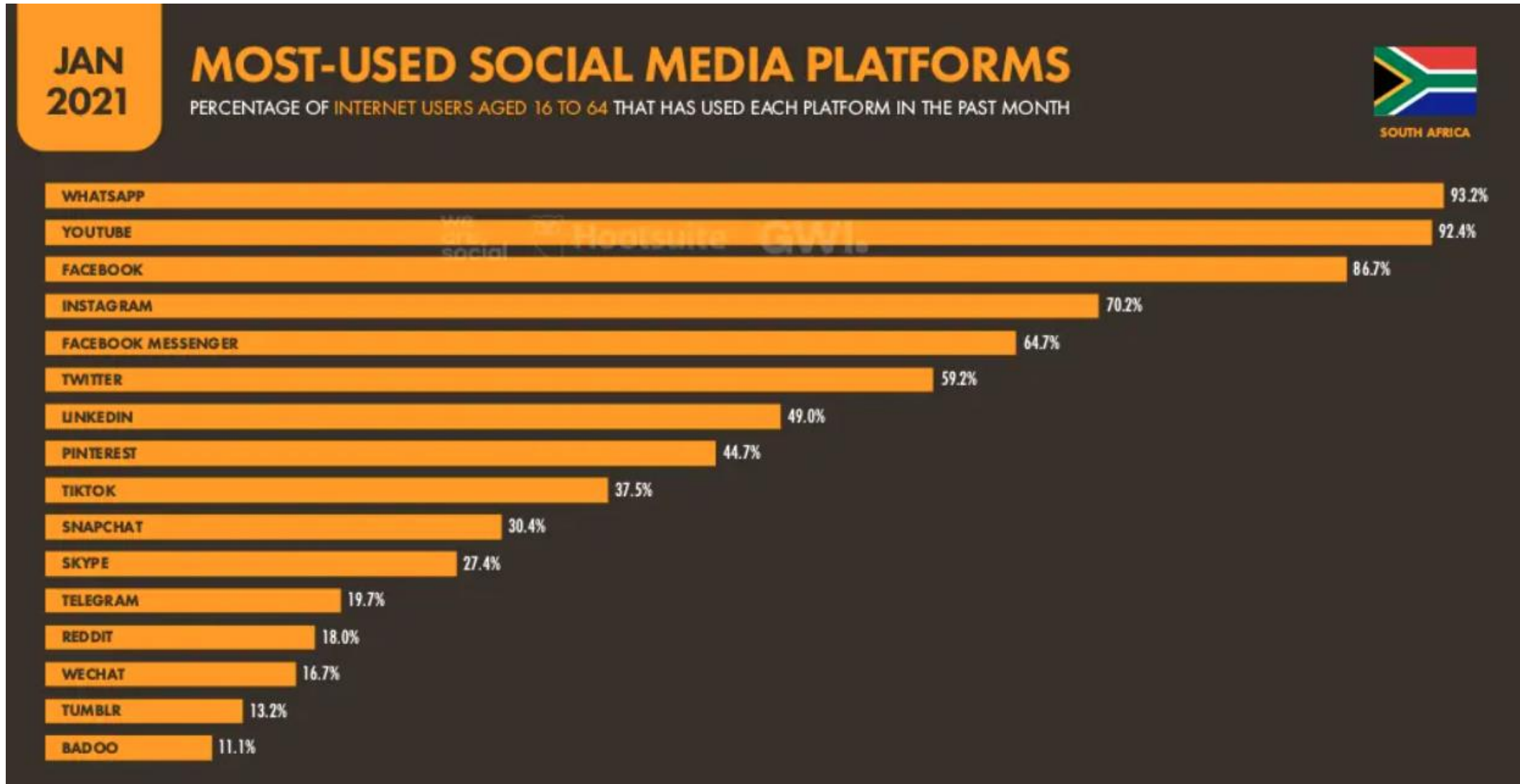
Digital Consumption

THE NUMBER OF SOCIAL MEDIA USERS INCREASED BY 14% BETWEEN 2020 AND 2021



Digital Consumption

WHATSAPP IS THE MOST USED MESSAGING APP



Outdoor Sites

AIRPORT SITE

**Name**

King Shaka Airport

City

La Mercy, Durban

Format

Externally illuminated

Location

King Shaka Airport, La Mercy, Durban.

Outdoor Sites

AIRPORT SITE



Name

Cape Town International Airport

City

Matroosfontein, Cape Town

Format

Non illuminated

Location

On the left-hand side of the exit from multi-storey parkade 2, Cape Town International Airport, Matroosfontein, Bellville.

Outdoor Sites

AIRPORT SITE



Name

O.R. Tambo International Airport

City

Kempton Park, Gauteng

Traffic

Average of 896,516 passengers per month

Location

Domestic arrivals & departures– Landside

Let's Discuss

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